

PROJECT WORKPLAN

R = responsible to initiate, to do, or to manage
R+ = person accountable if more than one individual has R
A = Approve
C = Consult or advise
I = be informed

Planning for Informational Meetings Tool 16 Project Workplan - For Complex Meetings

			PROJECT TEAM MEMBERS														
			IWMD		Browning & Assoc		City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat			
			Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat		
ACTIVITIES			DUE DATE														
City of Brea (Olinda Alpha)																	
	City Council Update						C	1									
1	Schedule 8/21 Agenda Item	7/2/01		R+			R										
2	Develop Presentation	8/3/01		R+	C									1	C		
3	Prepare Presenter: Ms. Jan Goss	8/15/01		R	C									I	I		
Public/Press Communications																	
4	Refine Process Graphic	8/1/01	R	R+	C									C	I		
	Newsletter						I	I									
5	Obtain Resident & Business Mailing Procedures/Costs	7/20/01		A	C	R											
6	Issue Date (Printing)	8/22/01	R	R+	C	I											
7	Write Background/History - What is IWMD	7/19/01	R	C	C									I	I		
8	Write Process Description (Flow Chart Graphic)	7/19/01		A	C									C	C		
9	Write What is RELOOC - LH-A, SB-C, CA & BS-C	7/19/01												I			
10	Describe Opportunities/methods of public input (Email, Hot Line, Web Site)	7/19/01	R	A											I		
11	Draft Invitation to Public Meeting(s) (Cover Letter)	7/19/01	R	A	C									I			
12	Draft FAQs (address key issues)	7/19/01		A	R									I	C		
Direct Mail Invitation																	
Influential communicators (350)																	
13	Draft Invitation Letter	8/21/01		R+	R												
14	Obtain list/labels	7/2/01				R											
15	Prepare labels	8/9/01		R													
16	Prepare and mail letter	TBD		R													
Council Members & City Officials																	
17	Obtain list/labels	7/16/01				R											
18	Prepare labels	8/9/01		R													
19	Prepare and mail letter			R													
Environmental Groups																	
Hills for Everyone, Save Brea Hills, Others?																	
20	Identify groups/contact person					R		C									
21	Obtain list/labels	7/16/01				R+		R									
22	Prepare labels			R													
23	Prepare and mail letter			R													
Other Business/Community Groups																	
24	Identify groups/contact					R		C									
25	Obtain list/labels					R+		R									
26	Prepare labels	7/16/01		R													
27	Prepare and mail letter			R													
Notices/Advertisements/Press Release																	
Press Release			8/20/01														
28	ID Press Contacts & brief prior to release	8/20/01	R	R+	C			I	I								
29	Write release		R	A	C											C	
30	Obtain Media Contact List from Cindy Ryan	7/16/01					R	C									
31	Distribute press release	Wk of 8/27/01	R					I	I								
Public Meetings (4) - (sample Mtg. Planning Cklist attached)			8/22-9/20/01														
East: Unocal/Hartlev Research Center																	

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			IWMD		Browning & Assoc		City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat		
ACTIVITIES		DUE DATE	Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat	
	Contact: Ms. Zeni Shelton, Supervisor, Office Services &						I	I								
	Organizational Coord'r; Phone: 714-577-2780															
32	Determine W/Th Dates Available:					R	I	C								
33	Determine Time(s) of Day: 9-1? 5-9?			C	C	R	I	C								
34	Design Meeting Format /Agenda			R+	R	C	C	I								
35	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
36	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+										C	I	
37	Develop Budget:			R+	C	R										
	Contact: Lee Jackson, Property Mgr., Park Glen Property Mgt.						I	I								
	Phone: 714-255-9450															
38	Determine W/Th Dates Available:					R	I	I								
39	Determine Time(s) of Day: 9-1? 5-9?			C	C	R	I	I								
40	Design Meeting Format /Agenda			R+	R	C	C	I								
41	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
42	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+										C	I	
43	Develop Budget:			R+	C	R										
	Homeowner/Business Group Meetings						I	I								
	Olinda Village HOA						I	I								
44	Obtain Contact Name					R		C								
45	Determine Location / Address:			A	C	R										
46	Determine Date:			A	C	R	I	I								
47	Determine Time			A	C	R	I	I								
48	Design Meeting Format /Agenda			R+	R	C	C	I								
49	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
50	Determine A/V Equipment Needs					R										
51	Plan Food/Beverages/Tablecloths/Napkins			A	C	R										
52	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I	
53	Assess Signage Need / Number					R										
	Hollydale HOA						I	I								
54	Obtain Contact Name					R		C								
55	Determine Location / Address:			A	C	R	I	I								
56	Determine Date:			A	C	R	I	I								
57	Determine Time			A	C	R	I	I								
58	Design Meeting Format /Agenda			R+	R	C	C	I								
59	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
60	Determine A/V Equipment Needs					R										
61	Plan Food/Beverages/Tablecloths/Napkins			A	C	R										
62	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I	
63	Assess Signage Need / Number					R										
	Olinda Ranch - Developer Meeting						I	I								
64	Obtain Contact Name					R		C								
65	Determine Location / Address:			A	C	R										
66	Determine Date:			A	C	R										
67	Determine Time?			A	C	R										
68	Design Meeting Format /Agenda			R+	R	R										
69	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										

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			IWMD				Browning & Assoc		City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat	
			Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat		
ACTIVITIES		DUE DATE				R											
70	Determine A/V Equipment Needs					R											
71	Plan Food/Beverages/Tablecloths/Napkins			A	C	R											
72	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C										C	I	
73	Assess Signage Need / Number					R											
	Other HOAs(9?) Send Influential Communicator Letter						I	I									
74	Identify and Assess Meeting Necessity - None			A	C	R											
75	Chamber of Commerce						I	I									
	Obtain Contact Name					R		C									
77	Determine Location / Address:			A	C	R											
78	Determine Date:			A	C	R											
79	Determine Time?			A	C	R											
80	Design Meeting Format /Agenda			R+	R	C											
81	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R											
82	Determine A/V Equipment Needs					R											
83	Plan Food/Beverages/Tablecloths/Napkins			A	C	R											
84	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C										C	I	
85	Assess Signage Need / Number					R											
86	Link to General Plan Amendment - City Responsibility			R+	R		R	C									
87	Next meeting: September 3, 2001																
	Plan Follow-up			R+	C	R	I	I							I	C	
88	IWMD will provide a written summary of issues to serve as basis for response.			R+	C												
	San Clemente (Prima Deshecha)																
	City Council Briefings								I	R							
89	Schedule Briefings (two members per briefing)	Wk 9/10/01		R+						R							
90	Develop Presentation			R+	R				I	C							
91	Determine/Prepare Presenter			R	C												
	Homeowner/Business Groups Meetings (esp. directly impacted)																
	Telega Homeowners Association	Wk 9/17/01							I	I							
92	Obtain Contact Name					R			C								
93	Determine Location / Address:			A	C	R											

ACTIVITIES			DUE DATE	PROJECT TEAM MEMBERS												
				IWMD		Browning & Assoc		City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat	
				Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Strat
94	Determine Date:			A	C	R										
95	Determine Time?			A	C	R										
96	Design Meeting Format /Agenda			A	C	R										
97	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
98	Determine A/V Equipment Needs					R										
99	Plan Food/Beverages/Tablecloths/Napkins			A	C	R										
100	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I	
101	Assess Signage Need / Number					R										
	Forrester Ranch Homeowners Association and Master Builder	Wk 9/17/01							1	1						
102	Obtain Contact Name					R			C							
103	Determine Location / Address:			A	C	R										
104	Determine Date:			A	C	R										
105	Determine Time?			A	C	R			C							
106	Design Meeting Format /Agenda			A	C	R										
107	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
108	Determine A/V Equipment Needs					R										
109	Plan Food/Beverages/Tablecloths/Napkins			A	C	R										
110	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I	
111	Assess Signage Need / Number					R										
	San Clemente Chamber of Commerce	Wk 9/17/01							I	I						
112	Confirm Contact: Liz Brown?				C	R			C							
113	Determine Location / Address:			A	C	R										
114	Determine Date:			A	C	R										
115	Determine Time?			A	C	R										
116	Design Meeting Format /Agenda			A	C	R										
117	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
118	Determine A/V Equipment Needs					R										
119	Plan Food/Beverages/Tablecloths/Napkins			A	C	R										
120	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I	
121	Assess Signage Need / Number					R										
	Public Meetings (1 pending outcome of earlier meetings)					R										
	Location: Community Center	Wk 9/24/01							I	I						
122	Obtain Contact Name					R			C							
123	Determine W/Th Dates Available:					R			I							
124	Determine Time(s) of Day: 9-1? 5-9?			C	C	R			I							
125	Design Meeting Format /Agenda			A	C	R			I							
126	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R										
127	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C				I					C	I	
128	Develop Budget:			R					I							
	Direct Mail: Telega & Forster								I	I						
129	Determine mail date			C	C	R										
130	Write letter		R	A	C											
131	Produce/copy letter		R	R+												
132	Mail to impacted residents		R	R+												
	Sun Post press release & meeting to inform and give the plan's perspective								I	C						
133	Write release		R	A	C											
134	Contact /Schedule Meeting w/Fred Sweggle, "beat" reporter		R	R+												
135	IWMD will provide a written summary of issues to serve as basis for response.			R+	C	R			I	I				I	C	
	San Juan Capistrano (Prima Deshecha)															
	Homeowner Association & Groups Meetings															
	Homeowners Association-Ortega	Wk 10/1/01								I						

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			IWMD Browning & Assoc				City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat	
ACTIVITIES		DUE DATE	Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat
136	Confirm Contact: Ray Turner			I	C	R					C				
137	Determine Location / Address:			A	C	R									
138	Determine Date:			A	C	R									
139	Determine Time			A	C	R									
140	Design Meeting Format /Agenda			A	C	R									
141	Determine Room Capacity / Layout / Amenities (i.e., kitchen)			I		R									
142	Determine A/V Equipment Needs			C		R									

			PROJECT TEAM MEMBERS												
			IWMD		Browning & Assoc		City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat	
ACTIVITIES		DUE DATE	Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat
143	Plan Food/Beverages/Tablecloths/Napkins			A	C	R									
144	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I
145	Assess Signage Need / Number					R									
	Homeowners Association-Rancho San Juan	Wk 10/1/01				R					I				
146	Obtain Contact Name			I	C	R					C				
147	Determine Location / Address:			A	C	R									
148	Determine Date:			A	C	R									
149	Determine Time			A	C	R									
150	Design Meeting Format /Agenda			A	C	R									
151	Determine Room Capacity / Layout / Amenities (i.e., kitchen)			I		R									
152	Determine A/V Equipment Needs			C		R									
153	Plan Food/Beverages/Tablecloths/Napkins			A	C	R									
154	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I
155	Assess Signage Need / Number					R									
	Homeowners Associations (Other)										I				
156	Identify HOAs			I	C	R									
157	Obtain List of Contact Names from G. Scarborough			A	C	R									
158	Determine Location / Address:			A	C	R									
159	Determine Date:			A	C	R									
160	Determine Time			A	C	R									
161	Design Meeting Format /Agenda			I		R									
162	Determine Room Capacity / Layout / Amenities (i.e., kitchen)			C		R									
163	Determine A/V Equipment Needs			A	C	R									
164	Plan Food/Beverages/Tablecloths/Napkins			R+	C	R									
165	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I
166	Assess Signage Need / Number					R									
	CAUSE										I				
167	Contact Mark Neilsen	Wk 9/24/01		I	R	C					C				
168	Determine Location / Address:			A	C	R									
169	Determine Date:			A	C	R									
170	Determine Time			A	C	R									
171	Design Meeting Format /Agenda			A	C	R									
172	Determine Room Capacity / Layout / Amenities (i.e., kitchen)			I		R									
173	Determine A/V Equipment Needs			C		R									
174	Plan Food/Beverages/Tablecloths/Napkins			A	C	R					C				
175	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C									C	I
176	Assess Signage Need / Number					R									
	Public Meetings (1)														
	Location: Community Center, Ambuehl School or St. Margaret's of Scotland	Wk 10/8/01									I				
177	Obtain Contact Name										C				
178	Determine W/Th Dates Available:					R					I				
179	Determine Time(s) of Day: 9-1? 5-9?			C	C	R					I				
180	Design Meeting Format /Agenda			A	C	R					I				
181	Determine Room Capacity / Layout / Amenities (i.e., kitchen)					R					I				
182	Develop/Produce Handouts: June 2001 Update; promo items?		R	R+	C								C	I	
183	Develop Budget:		R	R+	C										
	Public/Press Communications					R					C				

			PROJECT TEAM MEMBERS														
			IWMD Browning & Assoc				City of Brea		City of San Clemente		City SJC	City of Irvine		Brian A. Stirrat			
ACTIVITIES		DUE DATE	Gordon/CMK	Hagthorp	Browning	Wendel	O'Donnell	Ryan	Hare	Parness	Scarborough	Hart		Arbogast	Stirrat		
	Direct Mail: Ortega 300 feet					R					I						
184	Determine mail date			C	C												
185	Write letter		R	A	C												
186	Produce/copy letter		R	R+													
187	Mail to impacted residents	9/24/01	R	R+													
Notices/Press Release																	
Capistrano Valley News Press Release		9/24/01									I						
188	Write press release		R	A	C												
189	Contact & Schedule meeting with Jonathan Volzke to provide plan perspective		R	R+													
Plan Follow-up																	
190	IWMD will provide a written summary of issues to serve as basis for response.			R+	C	R					I			I	C		